

## **Training Coordinator Update No. 12    October 4, 2004**

### ***Cutting the Link between Travel Orders and Training Registrations***

You may recall that some time ago we proposed the idea of changing the Center's policy on requiring travel orders in order to process conference and other individual training registrations. We have been working on this for some time and trying to find a good time to make the change, and we are now ready to implement the change. This has been coordinated with the Office of Chief Financial Officer. We are implementing effective October 1, 2004.

There are several benefits that we hope to achieve. First, we can do registrations as early as the decision is made for the person to participate, rather than waiting until the travel orders are processed which should make the process easier for everyone involved. Secondly, we hope that this will help ensure that we can always take advantage of early registration prices. We also hope to avoid last minute registrations; we still receive a large number of last minute requests. In nearly all cases, we hope that the registration will already be done and the confirmation received by the registrant before travel orders are initiated.

The essential changes are these:

1. Training registrations will be processed without travel orders.
2. The authorization by the organization for the training will be accomplished through the organizational unit training plans prepared and stored on ToTo. This makes it imperative that the plans are kept accurate and up-to-date and that any short-notice registrations are coordinated with the assigned ODWRB training specialist.
3. ODWRB will track and report those instances where registrations are processed and are subsequently cancelled and a full refund cannot be obtained to determine the impact of this process change on the training budget.
4. Orders for travel will include "training" in the purpose line to assist the OCFO in identifying those types of orders and vouchers. The OCFO will audit travel claims on a monthly basis to ensure that claims associated with training properly reflect provided meals and lodging.
5. In those rare occasions when registrations are approved by this office to be paid by the attendee, the employee will claim reimbursement directly from ODWRB rather than by claiming it on the travel voucher.
6. SF-1164's, Claims for Reimbursement, will no longer be required for any training reimbursements such as attending local conferences. Employees will submit their receipts directly to this office. ODWRB will handle reimbursements through an SF-182 form that is forwarded to Accounts Payable.
7. A revised cover sheet for submitting registrations to this office and for our return of the confirmation has been devised. Previously we used this document to

communicate with registrants. That function will remain, but we are requesting that you use this cover sheet on incoming requests so that we have the information we will need to identify the registrations with you and the organizations. A copy is attached to this notice. We will coordinate on the form process shortly.

The detailed document prepared by CFO explaining the processing changes regarding Travel Manager is attached. This document also covers the coordination activities between ODWRB and OCFO. These new procedures were covered in the Preparer training conducted this week.

### ***FY 05 Organizational Unit Training Plans***

The folders have been redone to reflect the new organizational entities. Once folders are accessible, we will send the “official” call.

As you prepare the training plans this year, please be aware that we are anticipating a significant reduction in the Center training budget for FY 05. As a result, it is more important to have accurate plans so that we can estimate whether we will have sufficient funds to cover requested training. The SLC is also looking at priorities across the Center to ensure that funding is used to match the areas of need across the organization.

### ***FY 04 Was a Busy Year***

We are working on our end of year reporting now. We thought you might be interested in the statistics on how many training actions were processed. The branch processed a total of 1911 training purchases during FY 04. 1159 of the actions were accomplished by purchase card, 531 were purchases through colleges/universities or government agencies handled by issuance of an SF-182, and 221 were initiated through Purchase Requisitions processed by the Office of Procurement.